www.MUTTVILLE.org
senior dog rescue

255 Alabama St.
San Francisco, CA 94103
info@muttville.org

INTRODUCTION TO PLANNED GIVING

Do you want to help Muttville continue its lifesaving efforts to find loving homes for wonderful abandoned senior dogs? You can begin by including Muttville in your estate plans. To get you started, we have provided an introduction to some of the easiest and most common planned giving options below. However, please be aware that this information does not constitute legal or tax advice, and we encourage you to speak to an attorney for individualized guidance if you are interested in supporting Muttville through planned giving. You can find attorney referral information below.

Information to give your attorney

When you speak to your attorney about making a planned gift to Muttville, you'll need to provide the following information about us:

Name and contact information. Muttville, P.O. Box 410207, San Francisco, CA 94141. 415-272-4172.

Tax identification number. 26-0416747.

Tax status. Not-for-profit 501(c)(3) corporation.

Contact person. Kristin Hoff, plannedgiving@muttville.org

Bequests in a will or living trust

A bequest in a will or living trust is one of the simplest and most common ways to provide for Muttville. You can choose from several different kinds of bequests, depending on what you want to give. We've provided examples of a few different kinds of bequests, for you to discuss with your attorney.

A **specific bequest** gives Muttville a gift of a particular piece of property (like real property, securities or other specific personal property). If you disposed of the specific named property during your lifetime, Muttville would not receive the intended gift because we could not claim any other property as replacement. Example:

"I give to Muttville, a nonprofit organization established in 2007 with federal tax ID number 26-0416747, located at P.O. Box 410207, San Francisco, CA 94141, my ________ (here follows an accurate description of certain securities, real estate or other property)."

A **general bequest** gives Muttville a certain sum of money. If there isn't enough cash in your estate to cover the bequest, your other assets might be sold for cash to honor your wishes for Muttville. Example:

"I give to Muttville, a nonprofit organization established in 2007 with federal tax ID number 26-0416747, located at P.O. Box 410207, San Francisco, CA 94141, the amount of $________."

A **residuary bequest** gives Muttville the "rest, residue and remainder" of your estate, or more commonly, a percentage of the residue after all other bequests, debts and taxes have been paid. Example:

"I give to Muttville, a nonprofit organization established in 2007 with federal tax ID number 26-0416747, located at P.O. Box 410207, ________ percent of the residue of my estate."

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Beneficiary designations

You can also choose to list Muttville as a beneficiary of your retirement plan or insurance policy, which is very easy to do.

Gift of retirement assets. Most retirement plans, including 401(k)s and IRAs, are income tax deferred, meaning that income tax isn't paid until the funds are distributed during your lifetime or afterwards. This taxation makes retirement assets among the most costly assets to distribute to your loved ones because inheriting a retirement plan often generates income tax to the individual beneficiary. In contrast, naming a charity like Muttville as the beneficiary of your retirement assets after your lifetime generates no income taxes. This is because Muttville is tax exempt and eligible to receive the full amount, avoiding any income taxes.

To name or change a beneficiary on your retirement plan, you should ask the administrator of the IRA or retirement plan for a change of beneficiary form. Then, you decide what percentage of the plan's value (from zero to one hundred percent) you'd like us to receive. Finally, you name Muttville on the beneficiary form, record the desired percentage, and return the form to the plan's administrator.

Life insurance policies. Life insurance is another way you can provide funds to a beneficiary after your lifetime. The beneficiary designation in your life insurance policy determines where the proceeds will go. Life insurance can be distributed to a charitable organization like Muttville upon your death, if you name Muttville as a beneficiary of the policy.

To name or change a beneficiary on your life insurance policy, you should ask your insurance company for a change of beneficiary form for the life insurance policy. Then, you can decide what percentage of the policy's value (from zero to one hundred percent) you'd like us to receive. Finally, you can name Muttville on the beneficiary form, record the desired percentage, and return the form to the insurance company.

Attorney referrals

Some local organizations providing referrals for estate planning attorneys, and possibly free or low-fee wills, include:

- The Bar Association of San Francisco at 415-989-1616 or 415-782-8985; www.sfbar.org/lawyerreferrals/estate-planning-attorneys.aspx
- Legal Assistance to the Elderly at 415-538-3333; www.laesf.org

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PLANNED GIVING PLEDGE FORM

Thank you for including Muttville in your estate plans. Your pledge helps us continue our mission for many years to come – ***to change the way the world thinks about and treats older dogs and to create better lives for them through rescue, foster, adoption and hospice.***

Enclosed is an introduction to some of the easiest and most common planned giving options. However, please be aware that this information does not constitute legal or tax advice, and we encourage you to speak to an attorney for individualized guidance in supporting Muttville through planned giving. You can find attorney referral information in the enclosed information.

Mail completed form to: Muttville, ATTN: Planned Giving, P.O. Box 410207, San Francisco, CA 94141

☐ **YES! I/we have included Muttville in our estate plans.**

Name(s): ____

Address: ____

Phone: ____________________ **Email:** ____________________

Attorney's Name and Contact Information:

____

____

Planned Giving Instrument: *(please attach copy of signed instrument, if possible)*

☐ Specific Bequest:

____

____

☐ General Bequest:

____

____

☐ Residual Bequest:

____

____

Signature(s):

______________________________ Date: ____________

______________________________ Date: ____________

Office Use: __ DP __ Ack __ Am Date ___________